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Foreign Crops and MARKETS



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WORLD SUMMARIES:

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FOR RELEASE

MONDAY

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UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

L A T E N E W S

The milk supply in Cuba is now increasing seasonally. In the first quarter of the year, unusually dry weather resulted in a much below normal milk production in all areas except near Havana, where the drought was not so severe and where supplemental feeding partially offset poor pastures. The extension of duty-free entry privileges and the establishment of flexible ceiling prices for canned milk enabled importers to supply all essential demands in this period, though the price of manufactured dairy products rose.

The rainy season is now well advanced and milk supplies are steadily improving. Importers of canned milk are adjusting their stocks to lower levels because of the seasonal increase in local production and also because of higher United States prices. Duty-free privileges for canned milk expire on June 30 and may not be renewed.

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British East African sisal produced during the last 6 months of 1948 will be sold to the British Board of Trade on the same terms as under the existing purchasing agreement, except that prices for line fiber will be ten pounds sterling per long ton (about 1.8 cents per pound) more for each grade. Prices for tow will remain unchanged. Prices under the present agreement range from about 14.3 cents per pound for No. P.1 line fiber to about 11.9 cents for No. 2 Tow.

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A record large potato crop is indicated for Denmark this season. A sharp increase in plantings and good early season growing weather are the contributing factors. The acreage planted to potatoes in 1948 totals

WORLD RICE PRODUCTION INCREASES; STILL BELOW PREWAR 1/

The world rice harvest of 1947-48 (August-July) is estimated at 7,150 million bushels compared with 7,000 million in the preceding year, and with 7,450 million before the war, according to the fourth estimate of the Office of Foreign Agricultural Relations. Production is 2 percent larger than in the year before and 11 percent more than the harvest of two years ago, when production was at its lowest point as a result of the war. Despite the steady improvement, however, production is only 96 percent of the prewar (1935-36/39-40) average.

The world's harvested acreage is estimated to be about 2 percent larger than prewar. The increase is due primarily to acreage expansion in India during the war years. Excluding India, the total area harvested is estimated at 4 percent larger than in the previous year, but at 2 percent less than the prewar average. The season generally was favorable for rice production. Shortages of fertilizers, however, caused the yields per acre in many countries to be less than prewar.

Production increased on all Continents except in South America and Oceania. The most important gain was in Asia, but production was substantially larger also in Europe, Africa, and North America.

Asia's output is estimated at 6,650 million bushels compared with 6,550 million the year before, and with the prewar average of 7,125,000 million bushels. Production increased in all the important rice-producing countries of Asia except in the Indian Union, Pakistan, and Japan.

The largest gains in Asia's production occurred in the exporting countries of Burma, Siam, and French Indochina. Weather was favorable, and the crops exceeded early-season expectations. The total harvest of the three countries is now estimated at approximately 700 million bushels, or 28 percent more than the year before, and 46 percent larger than the production of two years ago. Their combined harvest nevertheless is about 200 million bushels less than the prewar average output.

China's rice crop was about 20 million bushels, or 1 percent larger than the year before, and was 96 percent of the 1931-37 average. Formosa harvested a record acreage, and the crop there was the largest since the war, but lack of fertilizers resulted in acre yields and production below prewar. Good weather favored Korea's rice crop, but there also shortage of fertilizers lowered the yields.

The rice acreage of the Philippines and the Malayan Union was increased to above the prewar average, and a pronounced gain occurred in the production of those countries. Weather was favorable also in the Netherlands Indies, and the harvest is estimated at about 7 percent larger than that of 1947, and 93 percent of the prewar average.

Lack of rainfall in the Province of Madras was the principal factor in the decrease of the rice crop of the Indian Union. Large harvests in the northern provinces offset that decline to some extent and therefore the production is only slightly smaller than in the year before. Available

1/ A more extensive statement may be obtained upon request from the Office of Foreign Agricultural Relations.

[illegible]

information indicates the condition of Pakistan's crop was below that of 1946-47, when the crop was very good. More than 1 million acres of 1946-47 rice acreage in that country were replaced by jute.

The crop of Japan was 1 percent less than that of the year before and was 93 percent of the prewar average. Weather conditions were less favorable than in the year before, and shortages of fertilizer were a factor in holding yields per acre below prewar.

European production is estimated at 55 million bushels, 34 percent more than the preceding year's small harvest of 41 million bushels, and 4 percent larger than the prewar average of 53 million bushels. Favorable weather in Italy and Spain, the two major-producing countries, made possible the largest harvest since the war. Portugal also had one of that country's largest crops.

In Africa, the harvest is placed at 167 million bushels compared with 147 million a year earlier, and with 108 million bushels before the war. The sharp rise in Egypt's output was the principal reason for the pronounced gain in 1947-48 production. Rice cultivation in many African countries was expanded as a result of wartime shortages of rice. In several countries further gains occurred in acreage and production in 1947-48. The crop in Madagascar is believed to be about average.

The total harvest of the Western Hemisphere is estimated at 257 million bushels, or 5 percent less than the production of 271 million bushels a year earlier, but 69 percent larger than the 152 million bushel average prewar production. The decrease in 1947-48 was caused by a drop in production in the countries of South America. The North American harvest showed a substantial gain above that of the year before.

North America's production, estimated at 102 million bushels, was up 8 million bushels over that of the year before and about 40 million bushels over prewar average production. The increase over 1946-47 was due principally to another record harvest in the United States. Production also was larger in Mexico, Cuba, Nicaragua, El Salvador, and Guatemala. Drought conditions reduced the harvest of the Dominican Republic, and the crops of Panama and Costa Rica were less than in the year before.

Production in South America is estimated at 155 million bushels, 22 million bushels less than in the preceding year, but 66 million bushels larger than prewar output. The largest decrease occurred in Brazil, where the crop was only 82 percent of the previous year's outturn. Plantings were reduced because of failure to export the previous crop at satisfactory prices, and unfavorable weather at the outset of the planting period prevented some acreage from being sown. Weather in the remainder of the season, however, generally was favorable.

The acreage of Ecuador was less than in the year before, and lack of rainfall further reduced the harvest. The planted acreage of Argentina was larger than in 1946-47, but because of cool rainy weather the harvest was smaller. Shortage of water supplies in Surinam caused a serious reduction of the crop.

WORLD 1948 WOOL PRODUCTION 2.7 PERCENT ABOVE 1947

World wool production in 1948 is estimated at 3,830 million pounds, an increase of 100 million pounds or 2.7 percent above the revised estimate for 1947. The indicated production for 1948 is based upon estimates of the clip now being shorn in the Northern Hemisphere and a forward estimate of the Southern Hemisphere clip for the season beginning this summer and fall.

A higher production than a year ago is indicated for nearly all continents except North America, where production has been declining for 6 years. The decrease for North America is due largely to competition of other farm enterprises. Elsewhere in the world, pasture and feed conditions for sheep raising and wool production have been favorable during the past year, except in a few European countries. This contrasts sharply to the previous year when drought in a number of countries, including areas in the principal wool-producing country of Australia, caused some decline in sheep numbers and reduction in wool yields.

The 1948 estimate of world production of 3,830 million pounds is only slightly below the average annual production of 3,920 million pounds for the years 1936-40, and is 5 percent above the average annual production of 3,640 million pounds for the period 1931-35. Strengthening of wool prices during the past year has tended to cause wool production to be maintained or increased in most of the important wool-producing countries.

As stock sheep numbers in the United States on January 1, 1948 were 5 percent below a year earlier, wool production in that country is expected to show some decline in 1948 from the previous year. Similar trends are occurring in Canada, and with other countries in North America producing about the same as last year, total wool production for that continent is estimated at only 312 million pounds, the lowest since 1925.

In Europe, wool production for the current year showed some increase over a year earlier for the fourth consecutive year. Production in 1948 equals or exceeds that of 1947 in all countries except Belgium, Czechoslovakia, Eire, Greece, and the Netherlands. Production in these countries is expected to be lower because of unfavorable pasture and feed conditions during the latter part of 1947, which resulted in some liquidation of livestock numbers. The 1948 production of 420 million pounds for Europe is well below the average of 514 million pounds for the years 1936-40.

In Asia, production in 1948 is believed to be about the same as in 1947, except in Turkey and India, where slight increases have been reported for 1948.

In South America, wool production for the season beginning this fall is expected to be slightly higher than the previous season in all the principal producing countries. Somewhat better pasture conditions have prevailed, especially in Uruguay, where flocks are recuperating from the 1945 drought. Strengthening of world prices of wool has tended to bolster wool production in Argentina, the principal wool-producing country in South America, during the past year, in contrast to a year earlier when export prices showed considerable weakness. Thus, Argentine wool production is expected to be maintained at the fairly high levels

(Text continued on Page 461; Table follows)

Continent and Country	Averages		1943	1944	1945	1946	1947 2/	1948 2/
	1931-35	1936-40	Million : pounds	Million : pounds	Million : pounds	Million : pounds	Million : pounds	Million : pounds
<u>North America:</u>								
Canada	17.3	15.6	17.8	19.3	19.6	17.1	14.1	11.3
<u>United States</u>								
Shorn	366.3	360.6	378.8	338.3	307.9	279.9	256.3	240.0
Pulled	64.8	64.7	65.2	73.5	70.5	61.3	52.0	50.0
Total	431.1	425.3	444.0	411.8	378.4	341.2	308.3	290.0
Estimated total 3/	458.2	451.7	472.8	442.2	409.2	369.5	333.6	312.5
<u>Europe:</u>								
Albania	4.2	4.4	3.9	4.2	4.4	4.8	4.8	4.8
Bulgaria	26.8	28.7	28.2	23.4	19.3	21.9	25.7	27.0
Eire	18.4	17.2	15.3	15.9	16.1	14.5	13.0	12.0
Estonia	1.9	2.4	-	-	-	-	-	-
Finland	2.3	2.7	1.8	2.2	2.2	2.6	2.4	2.4
France 5/	36.9	37.1	26.9	26.0	25.0	26.5	28.6	29.3
Germany	30.5	39.8	45.7	49.9	-	-	-	-
Greece	17.7	19.3	11.4	9.3	11.2	13.5	16.7	16.3
Hungary	11.4	12.9	8.6	8.2	2.3	3.3	4.0	5.0
Italy	31.0	30.4	26.7	23.4	23.8	24.7	27.0	29.0
Latvia	4.2	5.9	-	-	-	-	-	-
Lithuania	3.7	3.6	-	-	-	-	-	-
Netherlands	2.9	3.1	2.2	2.4	2.4	2.7	2.3	2.2
Norway	5.8	5.9	5.8	6.2	6.1	5.8	6.0	6.3
Poland	9.9	11.8	-	-	-	-	-	-
Portugal	15.8	16.3	17.1	16.7	15.8	17.6	18.0	18.0
Rumania	53.9	50.3	-	-	-	-	-	-
Spain	68.9	70.0	83.5	88.0	81.5	79.0	77.0	77.2
United Kingdom	113.8	110.1	90.4	85.6	83.7	87.5	70.0	70.0
Yugoslavia	30.7	34.7	-	-	-	-	-	-
Estimated total 6/	499.0	514.4	464.2	454.3	406.9	414.2	408.2	420.2
<u>Soviet Union</u>								
	159.6	272.0	260.0	245.0	250.0	260.0	270.0	285.0
<u>Asia:</u>								
Iran	38.0	36.3	27.5	27.7	28.7	29.5	30.0	30.0
Iraq	18.5	21.6	21.0	22.0	23.0	24.2	24.2	24.2
Syria and Lebanon	11.1	10.7	10.0	12.0	13.6	14.3	13.0	10.0
Turkey	41.4	67.7	62.0	67.0	70.0	69.0	56.0	61.0
Afghanistan	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0
China 1/	90.0	88.0	85.0	75.0	75.0	75.0	75.0	75.0
India	71.9	72.9	80.0	76.0	75.0	80.0	80.5	85.0
Estimated total 3/	318.1	344.2	332.5	326.8	332.5	339.3	326.0	332.5

<u>South America:</u>												
Argentina 9/												
Brazil 10/	361.0	411.0	515.0	505.0	505.0	515.0	495.0	500.0				
Chile	35.0	35.5	39.0	40.0	39.0	39.0	39.0	43.0				
Peru 11/	33.8	32.6	35.0	34.0	34.8	33.0	32.0	35.0				
Uruguay 12/	18.4	19.4	19.0	19.8	20.1	20.1	20.1	21.0				
Estimated total 13/	110.6	126.2	147.9	156.6	175.2	176.0	160.0	170.0				
	575.5	638.9	771.6	771.6	791.2	800.6	763.6	786.8				
<u>Africa:</u>												
Algeria												
Egypt	19.1	22.6	23.0	22.7	21.6	19.8	20.2	20.2				
French Morocco	5.8	7.5										
Tunisia	30.7	35.1	40.0	39.0	40.0	30.0	25.0	28.0				
Union of South Africa 14/	11.9	12.0	14.5	13.0	13.2	11.8	11.0	7.9				
Estimated total 15/	269.0	252.0	250.0	234.0	210.0	210.0	208.0	210.0				
	343.1	336.5	339.9	321.3	297.5	284.4	277.0	278.9				
<u>Oceania:</u>												
Australia												
New Zealand	1,010.5	1,051.9	1,169.0	1,016.5	932.9	970.0	990.0	1,040.0				
Estimated total	281.1	313.8	330.0	372.0	365.0	360.0	360.0	370.0				
	1,291.8	1,365.9	1,499.1	1,388.6	1,298.0	1,330.1	1,350.1	1,410.1				
Estimated world total 16/	3,640.0	3,920.0	4,140.0	3,950.0	3,790.0	3,800.0	3,730.0	3,830.0				

1/ For summary purposes wool produced mostly in the spring in the Northern Hemisphere is combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. 2/ Preliminary. 3/ Includes estimates for Mexico, Newfoundland, Netherlands West Indies, Guatemala and El Salvador. 4/ Includes Southern Dobrudja with Bulgaria and excludes it from Rumania for these years. 5/ Data for years 1945 and 1946 not comparable with prewar and 1947. 6/ Includes estimates for countries producing 2 million pounds or less, namely Austria, Belgium, Czechoslovakia, Denmark, Iceland, Sweden and Switzerland. 7/ Includes China Proper (22 provinces), Manchuria, Jehol and Sinkiang (Turkestan). 8/ Includes estimates for Cyprus, Palestine, Trans-Jordan and Outer Mongolia. 9/ Based on estimates of the Buenos Aires Branch, First National Bank of Boston. 10/ Estimates based largely on production in Rio Grande do Sul, which produces about 80 percent of the total. 11/ Based on surveys of the Junta Nacional de la Industria Lanar. 12/ Estimates of the Camara Mercantil de Productos del Pais (Mercentile Exchange of Uruguay). 13/ Includes relatively small production in Bolivia, Colombia, Ecuador, Falkland Islands, Paraguay and Venezuela. 14/ Union of South Africa, Union Protectorates and South West Africa. 15/ Includes estimates for Kenya, French West Africa and Libya. 16/ Rounded to tens of millions.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research, and other information. Estimates for countries having changed boundaries have been adjusted to prewar boundaries except as noted.

WORLD PEACH PRODUCTION 35 PERCENT ABOVE PREWAR

Production of peaches in the major producing countries of the world is estimated at 117,987,000 bushels, or 4 percent smaller than the estimated production in 1946 of 123,370,000 bushels and 35 percent greater than the 5-year (1935-39) average of 87,307,000.

Of the major producing countries of the world, the United States produces 70 percent, Italy 9, Argentina 5, and Mexico and Australia, 2 percent each.

Production in North America is estimated at 86,329,000 bushels, 5 percent below the estimated production of 90,857,000 produced during 1946, but 47 percent more than was produced during the 5 years (1935-39). The United States production of 82,603,000 bushels is about 4,000,000 bushels below the record crop in 1946 of 86,643,000.

Production in Europe is estimated at 19,486,000 bushels, about the same as in 1946, and the 5-year (1935-39) average. The crop in Italy, the largest European producer is estimated at 10,750,000 bushels, about the same as 1946 but a little less than the 11,011,000 bushels produced during the 5 years (1935-39). In France, the crop is estimated at 5,158,000 bushels, or about 470,000 more than was produced in 1946 and 2,169,000 more than the prewar average. Stone fruit harvested in the early months of the summer escaped the effects of the drought. Production in Spain is estimated at 1,000,000 bushels, or about half as large as in 1946 and 38 percent as large as the prewar average of 2,646,000 bushels. The peach crop in Spain in 1947 suffered from fruit flies and drought.

In Asia production is estimated as 1,858,000 bushels, 17 percent below the 1946 crop of 2,243,000 bushels and 34 percent less than the prewar average of 2,830,000.

South American production of 7,429,000 bushels represents the crops of only two countries, Argentina and Chile. Production in Argentina is indicated to be 6,429,000 bushels, about the same as last year. Chile's production of 1,000,000 bushels also is about the same as last season.

In South Africa the peach crop is estimated as 385,000 bushels. Because of drought, production is only about half as large as the 615,000 bushels produced during the preceding year.

Australia's crop of 2,300,000 bushels is 132,000 bushels less than last year but about the same as during the prewar period.

This is the first published estimate of world peach production by the Office of Foreign Agricultural Relations. Only estimates for countries where production statistics are available are shown.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDSFRANCE REPORTS FAVORABLE
GRAIN PROSPECTS

Weather conditions in France have continued to favor grain development and good yields are expected. No official estimate of the crop is yet available. On the basis of present yield prospects, however, it appears that the French wheat crop may approach the 1935-39 average of about 285 million bushels.

Such an ~~outturn~~ would imply above-average yields per acre since the wheat acreage is still somewhat below the prewar level. Wheat acreage as of May 1, when seeding was largely completed, was officially estimated at 10.6 million acres. Though somewhat larger than the abnormally small 1947 area and slightly larger than in 1946, it is about 15 percent below the 1935-39 average. The crop is reported to be at least 2 weeks in advance of normal.

The condition of other grains is also reported to be highly satisfactory. The acreage seeded to rye as of May 1, was 1.2 million acres, somewhat larger than in the preceding year. The oats acreage, at 6.1 million acres, was also larger, but the final acreage for this year is not expected to show much change from the 1947 figure. The barley acreage of 2 million acres was about the same as on that date of 1947 and was well above the prewar average. The final figure, however, is expected to be smaller than in 1947, since seedings last May were abnormally heavy.

SYRIAN GRAIN OUTLOOK
PROMISING

Prospects for the 1948 wheat crop in Syria are unusually favorable, and the outturn is expected to be one of the largest on record according to recent reports. The present forecast of 22 million bushels is about 47 percent above the small crop in 1947. The prospective crop would provide some surplus for export.

Present favorable prospects are, largely, attributed to abundant moisture during the early months of 1948, which overcame the deficiency during November and December, 1947. A favorable outlook is reported for all grains.

Some increase in acreage is reported for all grains, with wheat acreage about 50,000 acres larger than last year's area. This increase, principally in Jezireh, is contrary to earlier reports that drought and seed shortages had caused a reduction in acreage.

Stocks on hand in early May were reported to be sufficient to carry the country until the new crop comes on the market. The Syrian Government

has already circulated an announcement that it is prepared to receive offers for about 2 million bushels of wheat during the coming marketing year. No terms of sale were stated, except that payment in dollars is desired.

U.S. RICE EXPORTS REACH NEW HIGH

Deliveries of United States rice to foreign countries during the August-April period of the current marketing year set another high mark when exports reached 728 million pounds compared with 698 million pounds, the previous record set in the corresponding months of the preceding year. About 65 percent of exports was shipped to Western Hemisphere countries, and over 30 percent to Asia.

Rice in significant quantities was delivered to European countries for the first time since the war. Of 20 million pounds exported to Europe, 9 million went to Austria, 8 million to Greece, and 2 million to France. Exports in April continued heavy. About 60 percent of the month's shipments went to China, and more than one-fourth to Cuba.

UNITED STATES: Rice exports to specified countries, April 1948, with comparisons a/

Continent or country	August - July		August-April		April	
	1937-38	1946-47	1946-47	1947-48	1947	1948
	to					
	1941-42			b/		b/
	Million	Million	Million	Million	Million	Million
	pounds	pounds	pounds	pounds	pounds	pounds
Europe.....	43	c/	c/	20	c/	4
Cuba.....	275	465	341	409	84	26
Canada.....	19	24	23	52	c/	2
British West Indies..	c/	2	2	9	c/	3
Philippines.....	c/	254	254	c/	0	0
China.....	d/	67	49	165	0	57
Korea.....	d/	0	0	49	0	0
Other countries.....	21	22	29	24	1	1
Total.....	358	834	698	728	85	93

Compiled from official records, Bureau of the Census.

a/ Includes milled rice, brown, broken, screenings and rough rice converted to milled at 65 percent.

b/ Preliminary. c/ Less than 500,000 pounds. d/ If any, included in other countries.

TROPICAL PRODUCTS

MADAGASCAR VANILLA BEANS FACE DWINDLING MARKET

Re-exports of Madagascar vanilla beans from France to the United States, the principal market, dropped sharply during the first 4 months of 1948. The vanilla bean exporters in Marseille believe the principal cause is the high minimum export price set by the French Government of

\$15.00 to \$17.00 per kilogram (\$6.80 to \$7.71 per pound), f.o.b. Madagascar ports. The Chamber of Commerce in Marseille at a meeting on April 23, 1948, passed a resolution urging abolition of minimum export prices on vanilla beans. It also is reported that most of the exporters in Madagascar favor abolition of these prices.

Large stocks of vanilla beans, the disposition of which constitutes a pressing problem, have accumulated in Madagascar. These stocks now are estimated at 1,984,000 pounds, of which at least 441,000 pounds have deteriorated so much that they are no longer acceptable for the United States market. In addition, the 1948 crop, officially estimated at 838,000 pounds and by private sources at 1,323,000 pounds, will be coming on the market by the end of the year. The French Government in recent discussions with representatives of the American Vanilla Bean Association requested that American importers agree to purchase 220,000 pounds of the beans in 1948 and 661,000 pounds in 1949. If this were done, the French Government would be willing to destroy 661,000 pounds of old crop beans and 441,000 pounds of new. American importers, however, agreed to purchase only 265,000 pounds in 1948 and 265,000 pounds in 1949, in view of the possibility of larger than normal crops in Mexico.

Prior to World War II, it was customary to ship most of the vanilla produced in the French Colonies to Marseille for re-export. Beginning in 1944, most of the shipments were made direct from Madagascar to the United States. During 1947, however, Marseille exporters again handled fairly large quantities of beans, even though they had to charge about 16 cents more per pound than exporters in Madagascar. In return for this charge, they render a considerable service to vanilla importers in other countries. The loss due to shrinkage of beans during the long trip from Madagascar is largely absorbed by the exporters in Marseille. Upon arrival there, the beans are re-sorted and re-packed, and those not meeting a certain standard are rejected. The Marseille exporters also sell vanilla in either large or small lots, whereas those in Madagascar generally are interested only in large quantities.

ANGOLA'S COFFEE

CROP LOWER

The 1948 coffee crop in Angola, harvested from May to August, is estimated at 765,000 bags which is slightly less than the 1947 crop of 776,000 bags. The smaller output is attributed to unusually dry weather in the fall of 1947 when the trees were in blossom.

During 1947, Angola exported 734,000 bags of green coffee of which 214,000 bags were shipped to the United States, 163,000 to Portugal, 154,000 to the Netherlands, 149,000 to Belgium, and 54,000 bags to other countries.

Prior to May 4, 1948, prices for Angolan coffee were fixed by the Portuguese Government. This procedure has now been suspended, with the result that activity on the Angola market has increased. From January 1 to May 15, 1948 Angola exporters sold 40,000 bags of coffee to the United States.

PURCHASES OF COCOA BY MARKETING BOARDS

Purchases of main crop cacao in the Gold Coast by the Gold Coast Cocoa Marketing Board from October 3, 1947, through May 27, 1948, totaled 203,826 long tons (456.5 million pounds). In Nigeria and the Cameroons, the Nigeria Cocoa Marketing Board had purchased 68,823 long tons (154.2 million pounds) of main crop cacao through May 20, 1948. Marketing of the main crops is practically completed. The midcrop in the Gold Coast is estimated at 22 million pounds and that in Nigeria at 17 million pounds, which would make a total 1947-48 production of about 650 million pounds in the Gold Coast and Nigeria, which compares with 676 million pounds for the 1946-47 season.

FATS AND OILS

ARGENTINE JANUARY-APRIL LARD EXPORTS BELOW NORMAL

Argentine lard exports in April 1948 amounting to 1,354 short tons, represented 90 percent of the total for January-April. This year's shipments have been negligible compared with the 11,724 tons in January--April 1947, and 9,000 in the corresponding months of 1946. So far this year shipments have been chiefly to European countries.

ARGENTINA: Lard exports, April 1948 with comparisons.
(Gross weight)

Country of destination	Average: 1935-39:	1947	January-April 1947	January-April 1948 a/	April 1948 a/
	Short tons	Short tons	Short tons	Short tons	Short tons
North America:					
Netherlands West Indies.	-	583	583	1	1
Others.....	-	141	141	-	-
Total.....	-	724	724	1	1
South America.....	685	3,283	2,751	25	-
Europe:					
Hungary.....	-	2,389	2,389	447	447
Italy.....	127	4,234	2,595	-	-
United Kingdom.....	6,673	3,821	3,026	906	906
Others.....	919	585	83	141	-
Total.....	7,719	11,029	8,093	1,494	1,353
Others.....	163	157	156	-	-
Grand total.....	8,567	15,193	11,724	1,520	1,354

Compiled from official sources and consular reports.

a/ Preliminary.

ARGENTINA'S CATTLE-FAT EXPORTS ABOVE AVERAGE

Although Argentina's April exports of tallow and cattle fats were smaller than for any preceding month in 1948, the January-April shipments of 21,158 short tons were larger than in the corresponding month of recent years. European countries received 52 percent and North American countries 40 percent. Canada was the largest recipient, receiving 30 percent of the total exports.

ARGENTINA: Tallow and cattle fat exports, April 1948 with comparisons (Gross weight)

Country of destination	Average:		January-April		April
	1935-39:	1947	1947	1948 a/	1948 a/
	Short	Short	Short	Short	Short
	tons	tons	tons	tons	tons
North America:					
Canada.....	7	-	-	6,380	-
Cuba.....	377	15	-	1,767	-
Mexico.....	11	659	656	-	-
Others.....	9,935	799	323	229	128
Total.....	10,330	1,473	979	8,376	128
South America.....	1,914	4,807	2,988	1,050	5
Europe:					
Belgium.....	2,974	1,596	890	468	27
France.....	937	1,238	606	3,886	-
Italy.....	2,082	3,481	128	13	-
Netherlands.....	7,875	2,988	2,372	553	-
Sweden.....	1,695	2,513	2,344	-	-
Switzerland.....	1,133	1,202	434	481	-
United Kingdom.....	17,903	19,374	2,381	3,976	1,613
Others.....	18,063	10,904	1,823	1,709	453
Total.....	52,662	43,296	10,978	11,086	2,093
China.....	102	72	67	-	-
Soviet Union.....	-	4,508	-	-	-
Others.....	232	589	226	646	244
Grand total.....	65,240	54,745	15,238	21,158	2,470

Compiled from official sources and consular reports.

a/ Preliminary.

U. S. IMPORTS LESS VEGETABLE OILS AND OILSEEDS

United States imports of specified oils and oilseeds totaled 446.0 million pounds (in terms of oil) during January-April compared with 535.7 million in the corresponding months of 1947. The greatest decrease was in receipts of copra and linseed oil. While coconut oil imports were more than three times the quantity received in the first four months of 1947, they did not compensate for the loss of copra. Imports of babassu and tucum-kernels, olive oil and palm oil were larger than for the same period of 1947.

(table on following page)

UNITED STATES: Imports a/ of specified oils and oilseeds,
April 1948 with comparisons

Commodity	Unit	Average 1935-39	1946	1947	January-April 1947 1948 b/	
Babassu kernels....	1000 lbs.	c/	39,463	22,233	16,248	25,896
Babassu oil.....	" "	d/ 346	2,314	1,747	551	1,223
Castor-beans.....	" "	132,924	226,295	276,807	104,080	109,366
Castor oil.....	" "	226	6,450	6,595	5,752	1,108
Flaxseed.....	" bu.	18,470	3,394	282	63	14
Linseed oil.....	" lbs.	713	94,405	117,326	52,373	2,799
Copra.....	Short tons	230,000	394,696	677,660	260,492	197,575
Coconut oil.....	1000 lbs.	342,717	2,353	23,559	9,272	32,733
Oiticica oil.....	" "	d/ 7,673	22,593	8,471	5,698	4,343
Olive oil:						
Edible.....	" "	62,811	12,660	11,250	3,740	11,308
Inedible.....	" "	35,448	103	248	182	6,229
Palm oil.....	" "	321,482	37,850	63,212	14,379	17,736
Sesame seed.....	" "	58,425	4,891	9,479	5,061	4,533
Tea seed oil.....	" "	13,159	88	6,377	1,892	542
Tucum kernels.....	" "	e/ 9,810	12,709	16,887	5,192	8,454
Tung oil.....	" "	123,190	36,207	121,564	50,597	47,158

Compiled from official sources.

a/ Imports for consumption. b/ Preliminary. c/ Not separately classified in Foreign Commerce and Navigation. d/ Average of less than 5 years. e/ 1939 only.

TOBACCO

INDIA'S TOBACCO PRODUCTION AND FOREIGN TRADE AT PREWAR LEVEL

The 1947-48 production of tobacco in India was recently reported at near the average prewar production of about 1,110,000,000 pounds. Production of flue-cured leaf, which accounts for about 6 percent of the total, was reported far above the prewar level. April 1947-March 1948 exports, comprised of flue-cured and sun-cured leaf, was near prewar, but was substantially below the high exports in 1946-47. Imports in 1947-48 were approximately equal to those of the preceding year and substantially above the prewar level.

Latest official estimates of tobacco production in all parts of India, which ranks with China as the most important tobacco producing country other than the United States, were for the 1945-46 crop and totaled 950,000,000 pounds, as compared with the prewar 1935-36 through 1939-40 average of 1,110,000 pounds. The relatively low 1945-46 crop was attributed to war-time regulations connected with a "Grow More Food" campaign. These regulations were subsequently relaxed and observers believe that the 1947-48 crop was near the prewar average. The production in India includes numerous types both of the Nicotiana rustica and Nicotiana tabacum species. Tobacco grown for export and for use in the manufacture of cigarettes in India is limited to some of the Nicotiana tabacum types, including American-type flue-cured.

Official estimates of the country's flue-cured production in recent years are not available, but trade sources estimate the 1947-48 crop at about 71,000,000 pounds, as compared with 58,650,000 pounds in 1946-47 and the five-year average 1941-42 through 1945-46 production of 59,039,000 pounds. Production for the 5 prewar years 1935-36 through 1939-40 averaged about 38,000,000 pounds. Increased production in 1947-48 is believed to have been in response to higher prices for the 1946-47 crop, which occurred as a result of increased demand both for domestic consumption and export.

Exports of leaf from India, principally flue-cured and sun-cured, for the fiscal year April 1947 - March 1948 were recently reported at approximately 40,000,000 pounds, as compared with 75,000,000 in 1946-47 and only 21,700,000 pounds in 1945-46, the most recent fiscal year for which official information is complete. Exports for the 5 years 1940-41 through 1944-45 averaged 39,600,000 pounds and for the 5 prewar years 1935-36 to 1939-40, 43,500,000 pounds.

Estimates of 1947-48 exports show approximately 15,000,000 pounds to the United Kingdom and 25,000,000 pounds to all other countries. In 1946-47, the exports to other countries were approximated at 48,000,000 pounds, which cannot be supported by data on imports into countries which normally take a volume of Indian tobacco. Authentic information is not available, but it is believed that the reported large exports from India to countries other than the United Kingdom may have been comprised of substantial shipments to the U.S.S.R. and shipments to a large number of other countries which normally do not import significant quantities of Indian leaf. It is probable that a large portion of this tobacco was Indian sun-cured types.

INDIA: Exports of leaf tobacco, April 1947 - March 1948,
with comparisons

Country of Destination	5-year averages		1945-46	1946-47 a/	1947-48 a/
	1935-36 to 1939-40	1940-41 to 1944-45			
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United Kingdom	20.0	17.9	11.1	27.0	15.0
Other Countries	23.5	21.7	10.6	48.0	25.0
Total	43.5	39.6	21.7	75.0	40.0

a/ Approximated from incomplete returns.

Source: Sea-Borne Trade and Navigation of British India, except where noted.

Imports of tobacco into India, principally flue-cured leaf from the United States, in 1945-46, the last fiscal year for which complete returns are available, totaled 14,900,000 pounds, as compared to 10,400,000 pounds, the average 1940-41 through 1944-45 imports and the prewar 1935-36 through 1939-40 imports of only 4,800,000 pounds. Incomplete returns for 1946-47 and 1947-48 imports indicate a total of approximately 11,000,000 pounds for each of the two years.

(Continued on Page 457)

WORLD PEACHES--(Continued from Page 447)

Peaches: Production in specified countries, average 1935-39, annual 1940-47

Countries	Average	1940	1941	1942	1943	1944	1945	1946	1947
by Continent	1935-39	1940	1941	1942	1943	1944	1945	1946	1947
	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	bushels	bushels	bushels	bushels	bushels	bushels	bushels	bushels	bushels
North America:									
Canada	1,023	1,345	1,579	2,003	633	1,698	1,566	2,145	1,659
Mexico	1,410	1,598	2,003	1,987	1,899	2,218	2,275	2,069	2,067
United States	56,478	57,832	75,363	66,720	42,761	78,191	81,548	86,643	82,603
Total	58,911	60,775	78,945	70,710	45,293	82,107	85,389	90,857	86,329
Europe:									
Austria	130	55	106	73	133	75	150	162	75
Czechoslovakia	114	7	17	19	30	29	16	134	104
France	2,989	4,083	4,760	4,518	2,403	3,671	2,764	4,688	5,158
Germany	1,034	873	413	473	721	450	800	900	500
Greece	424	489	394	438	398	457	384	400	597
Italy	11,011	12,635	10,187	11,326	10,274	11,595	9,726	10,144	10,750
Netherlands	45	59	69	66	74	114	86	145	149
Spain	2,646	2,823	2,862	3,387	3,089	3,388	2,000	1,897	1,000
Sweden	20	28	37	23	100	156	184	161	184
Yugoslavia	639	1,143	922	1,024	931	1,046	879	914	969
Total	19,052	22,195	19,767	21,347	18,153	20,981	16,989	19,545	19,486
Asia:									
Lebanon	18:1/2	22:1/2	15:1/2	18:1/2	81	156	184	161	184
Syria	2/	2/	2/	2/	2/	49	57	56	45
Turkey	400	403	294	406	436	303	354	322	368
Japan	2,183	2,265	2,606	2,564	2,289	1,736	1,739	1,515	1,121
Korea	229	282	325	320	286	217	217	189	140
Total	2,830	2,972	3,240	3,308	3,092	2,461	2,551	2,243	1,858
South America:									
Argentina	3/	2,896	4,151	2,866	6,758	4,437	7,987	6,467	6,429
Chile	3/	725	1,200	1,378	1,470	800	1,000	1,000	1,000
Total	3/	3,621	5,351	4,244	8,228	5,585	8,987	7,467	7,429

Estimates in original units of approximately one bushel in the following countries: Australia, Canada, United States, New Zealand, and South Africa. In other countries original estimates, mostly in metric tons, converted to bushels of 48 pounds.

1/ Includes Syria.
2/ Included with Lebanon.
3/ One Year.

1/ Includes Syria.
2/ Included with Lebanon.
3/ One Year.

TOBACCO

(Continued from Page 454)

PARAGUAY INCREASES TOBACCO
PRODUCTION AND EXPORTS

Paraguay's 1947-48 tobacco crop was somewhat below the large 1946-47 output, but was nearly double the average production for the years 1940-41 through 1944-45. Exports in 1947 were about 10 percent above the average of recent years, but 1946 exports were approximately double the average for the years 1941-45.

As a result of increased export demand for Paraguayan leaf tobacco, banks in Paraguay have encouraged larger production through higher guaranteed minimum prices. Prices, which in 1944, ranged in accordance with grades from about 2 to 4 cents per pound, have been increased and for the 1947-48 crop have been set at 6 to 9 cents per pound. Prices to growers have generally exceeded the bank's minimum guaranteed prices and leaf for export has sold far above the guaranteed minimums. In response to higher prices, production was increased from an average of 14,771,000 pounds during the five years, 1940-41 through 1944-45, to approximately 25,000,000 pounds in 1945-46. The 1946-47 crop totaled approximately 28,000,000 pounds and the 1947-48 crop has been forecast at about 24,000,000 pounds.

Exports in 1947, which were largely to Argentina and Uruguay or in transit through those countries to other destinations, are reported to have totaled 7,738,000 pounds, as compared with 14,650,000 pounds in 1946 and the average 1941-45 exports of 7,004,000 pounds.

EL SALVADOR INCREASES
IMPORTS OF U.S. TOBACCO

As a result of increased production of cigarettes in El Salvador, the country's imports of United States leaf, principally flue-cured, has increased sharply. Domestic production of flue-cured leaf is also higher.

In 1947, El Salvador imported 349,000 pounds of leaf from the United States, as compared with 246,000 in 1946 and the 5-year average, 1941-45, of approximately 60,000 pounds. The volume of imports from other sources, during recent years, principally cigar type leaf from Honduras, has ranged between 1,200,000 and 2,200,000 pounds annually.

The increased imports of United States leaf have been for use in cigarette production. In 1944, production of machine-made cigarettes in El Salvador totaled only 240,000,000 pieces, but by 1947 the production had increased to about 420,000,000 pieces. The larger output has occurred as a result of increased demand, which has accompanied higher purchasing power.

Domestic production of leaf in El Salvador during recent years has averaged around 1,000,000 pounds annually. Prior to 1929, the production was entirely of native types. Since that year American type flue-cured leaf has been produced and in recent years it has accounted for 40 to 50 percent of the total. The 1947-48 flue-cured crop is approximated at 400,000 pounds, as compared with the 1946-47 production of about 500,000 pounds. The low 1947-48 crop is attributed to unfavorable weather and insect damage.

COTTON

COTTON-PRICE QUOTATIONS
ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets, converted at current rates of exchange:

COTTON: Spot prices in certain foreign markets, and the
U. S. gulf-port average

Market location, kind, and quality	Date 1948	Unit of weight	Unit of currency	Price in: foreign: U.S. cents currency: per pound
Alexandria		:Kantar	:	:
Ashmouni, Good.....	6-10	: 99.05 lbs.	:Tallari	: 75.00 : 62.58
Ashmouni, F.G.F.....	"	: "	: "	: (not quoted)
Giza 7, Good.....	"	: "	: "	: (not quoted)
Giza 7, F.G.F.....	"	: "	: "	: (not quoted)
Karnak, Good.....	"	: "	: "	: 98.50 : 82.18
Karnak, F.G.F.....	"	: "	: "	: (not quoted)
Bombay		:Candy	:	:
Jarila, Fine.....	"	: 784 lbs.	:Rupee	: 736.00 : 28.32
Broach, Fine.....	"	: "	: "	: 926.00 : 35.63
Sind American, Fine.....	"	: "	: "	: (not quoted)
Punjab " 289-F, Fine:	"	: "	: "	: (not quoted)
Kampala, East African.....	"	: "	: "	: (not available)
Buenos Aires		:Metric ton	:	:
Type B.....	6-11	: 2204.6 lbs.	:Peso	:3,150.00 : 42.54
Lima		:Sp. quintal	:	:
Tanguis, Type 5.....	6-10	: 101.4 lbs.	:Sol	: 239.00 : 36.26
Pima, Type 1.....	"	:	:	: 281.00 : 42.63
Recife		:Arroba	:	:
Mata, Type 4 a/.....	6-11	: 33.07 lbs.	:Cruzeiro	: 170.00 : 27.97
Sertao, Type 4 a/.....	"	: "	: "	: 180.00 : 29.61
Sao Paulo		:	:	: (not available)
Sao Paulo, Type 5.....	"	: "	: "	: 185.50 : 30.52
Torreon		:Sp. quintal	:	:
Middling, 15/16".....	"	: 101.4 lbs.	:Peso	: : :
Houston-Galveston-New		:	:	:
Orleans Av., Mid. 15/16"...	"	:Pound	:Cent	: XXXXXXXX : 37.15

Quotations of foreign markets reported by cable. U. S. quotations from designated spot markets.

a/ Stocks of Type 5 exhausted until new crop arrives.

COTTON CONSUMPTION IN AUSTRIA SLOWLY RISING

Cotton spinning mills in Austria consumed 30,300 bales of 500 pounds grown during the 6 months ended January 31, 1948 which is almost equal to the 33,500 bales consumed in all of 1946-47. The rate of consumption rose by 28 percent between August 1947 and January 1948.

About 65 percent of the 30,300 bales consumed during August-January 1947 was cotton being processed for firms in other countries, principally Switzerland. Production of cotton cloth for foreign account represented 62 percent of the 24,900,000 yards produced in the 6 months mentioned above.

The present rate of consumption is only one-third of that in 1937 before the union of Austria with Germany. The principal factors reported as responsible for inability of the industry to rebuild a more substantial part of its prewar volume of production are shortages of accessories, spare parts for machinery, dyes, starch, chemicals, foreign exchange and skilled labor and the low efficiency of available labor. The number of workers (excluding clerical personnel) employed in the cotton textile industry increased from 9,977 at the end of December 1946 to 13,147 a year later. At the end of 1947, (1946 figures in parentheses) 50.9 (55.1 percent of them were employed in the French Zone, 26.4 (19.4) percent in the Soviet Zone, 16.7 (19.2) percent in the United States Zone, 6.0 (6.1) percent in the British Zone and 0 (.2) percent in Vienna.

Stocks of cotton held by mills in Austria on January 31, 1948 were equivalent to 17,300 bales, 58.5 percent of which was foreign-owned cotton to be processed in Austria. The figures for the end of August 1947 (July was not reported) were 16,900 bales and 61.5 percent.

Austria: Imports of cotton by country of origin 1946 and 1947
(In bales of 500 pounds gross)

Country	1946	1947
Switzerland.....	4,496	22,932
Brazil.....	526	9,346
Egypt.....	0	6,125
United Kingdom.....	1,592	5,032
United States.....	584	1,235
India.....	0	1,194
Peru.....	400	1,038
Other Europe.....	1,055	2,514
Others.....	0	1,339
Total	8,653	50,755

Source: Austrian Central Statistical Bureau

(Continued on Page 462)

FRUITS, VEGETABLES AND NUTSMEXICAN VEGETABLE SHIPMENTS
LOWER THAN LAST YEAR

The volume of fresh vegetables shipped from Mexico for the season ended May 22, 1948 amounted to 221.7 million pounds, about 13 percent lower than the 256.3 million shipped during the preceding season, and 21 percent above the 182.5 million shipped during the 5 years 1941-42 through 1945-46.

The decrease in volume shipped during the season just closed is attributed chiefly to heavy freezes during December 1947 and January 1948 which affected the growing areas in Sonora and Sinaloa; also to heavy losses due to ripened condition of tomatoes at the border during April 1948.

Shipments of fresh vegetables from the West Coast of Mexico
to the United States

Commodity	Season ended		
	May 15, 1946	May 15, 1947	May 22, 1948
	1,000	1,000	1,000
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
Tomatoes.....	172,004	234,314	199,414
Peppers, green.....	19,134	22,228	18,883
Peas, green.....	7,224	7,537	3,042
Mixed.....	872	1,191	326
Total.....	199,234	265,270	221,665

Source: Consular Reports.

CITRUS CROP IN SOUTH
AFRICA LOWER

The estimated production of all citrus in South Africa for the 1948-49 season is now indicated to be 5,590,000 boxes, a reduction of about 10 percent from the previous year's crop of 6,266,000 boxes, but an increase of 22 percent over the 1935-39 average of 4,573,000 boxes. Of the estimated 1948-49 production, oranges amount to 4,752,000 boxes, grapefruit 671,000, and lemons 167,000, compared with the preceding season of 5,326,000, 752,000 and 188,000 respectively. The decrease in production of 10 percent in the 1948-49 crop is due partly to severe hailstorm damage to citrus orchards in the Northwestern and eastern Transvaal and partly to lack of sufficient fertilizers.

WORLD WOOL PRODUCTION--(Continued from Page 444)

reached during the war, rather than to drop off as was indicated in 1946.

The Union of South Africa is by far the largest producing country in Africa. Some increase in wool production is expected there in 1948, but the size of the increase will be limited because of the larger-than-usual proportion of young sheep in the flocks. The sheep industry is recovering from the serious drought experienced in 1946.

For the first time since 1944, wool production in Australia is expected to exceed 1 billion pounds, including scoured wool at its greasy equivalent, and wool exported on skins. In May, conditions were reported as generally favorable in all pastoral areas throughout Australia, with the exception of northwestern and central western sections of Queensland. Good rains in many sheep-raising districts during April assured feed for winter. Stock are in very strong demand and supplies are still short, although numbers have been increasing as a result of good seasonal conditions. Spring lambing was good and the autumn drop is expected to be satisfactory in most states. Consequently, the present favorable outlook following the good general season of 1947 should result in a very satisfactory recovery of stock numbers in many areas which sustained heavy losses in the recent drought years. New Zealand is also expected to show a larger production of wool in the season beginning July 1 than was reported in the previous year.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report the Committee was composed of C. M. Purves, Acting Chairman, Floyd E. Davis, Anna A. Jones, Karen J. Friedmann, and Mary E. Long.

WORLD RICE PRODUCTION--(Continued from Page 440)

The acreage planted in Chile was slightly less than 1946-47, but good weather during the latter part of the season caused an increase in the yields per acre harvested. Peru planted one of that country's largest rice acreages, rainfall has been more plentiful than in the year before, and a record production is expected. In Uruguay, the acreage was again increased and another record crop was harvested. Production also was larger in Colombia and Paraguay.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, Russell S. Kifer, L. Thelma Willahan, and Constance H. Farnworth.

AUSTRIAN COTTON--(Continued from Page 459)

The number of cotton spindles in place declined from 601,480 on July 31, 1947 to 527,612 at the end of the year and looms in place declined from 14,775 to 13,986. These declines resulted from the dismantling of obsolete and worn out machinery in order to salvage useful parts needed for machinery still in operation. New parts are still not available in sufficient quantities.

Cotton imports in 1947 totaled 50,800 bales compared with 8,700 in 1946 and 198,000 in 1937. Most of the cotton imported in 1946 and 1947 was obtained from other countries in Europe under an arrangement whereby a portion of the yarn or cloth was retained in payment for processing and the remainder returned to the countries (mostly Switzerland) where the cotton was obtained.

L A T E N E W S

(Continued from Page 439)

339,000 acres and exceeds the 1947 acreage by 28 percent. Average yields on this increased acreage would result in a total production of about 91 million bushels, or 27 percent more than the previous record harvest in 1943 and 35 percent more than the 1947 crop.

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Cotton production in Peru, from the crop harvest now being completed, has been placed at 315,000 (500 lbs. gross weight bales) as compared to 296,000 bales from last year's crop. Marketing has been exceptionally active, with more than one-third of the crop already sold. Prices have risen steadily this year, with Tanguis (Type 5) quotations moving from 28.75 cents per pound to 35.20 cents during the two months of April and May. Because of the drought in the Piura Valley the Pima crop this year will be very small.

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The final official estimate of Egypt's 1947 cotton crop has been announced as equivalent to 1,289,700 bales (500 lbs. gross weight) from an area of 1,208,240 acres. Production of Karnak and similar long staple varieties amounted to 304,300 bales and Ashmouni, Zagora and the Medium staple varieties to 985,400 bales.

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